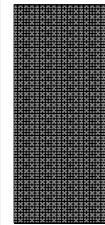


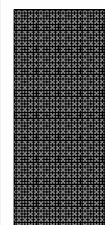
# SOCIAL MEDIA RECORDS MANAGEMENT

SESSION 6 OF 7 ON RECORDS MANAGEMENT



# SESSION GUIDELINES AND GENERAL INFORMATION

SESSION 6 OF 7 ON RECORDS MANAGEMENT



## GENERAL GUIDANCE FOR ON-LINE SESSIONS

1. Please remember that while you are in the on-line classroom, all other participants **can hear everything** you say (even in the background), and **can see everything** you write on the whiteboard.
2. I will be muting All participants to help with sound distortion.
3. Please make sure that all phones are muted during the sessions. **Press \*6 and your phone will be muted.**
4. Feel free to submit notes during session for discussion. If you would like to **send a note / comment**, please **send to "all"** so that everyone can see the question and then hear the answer to that question.
5. Please raise your hand if you wish to speak
6. Take a vote: How many of you are participating in today's session with a group of co-workers?
7. If so, how many of you are there in your group? (Send # as a note)
8. **At the end of the training, I will be taking questions.** Write down any questions you have during the session, and **you will have an opportunity to ask them at the end.**

## PRESENTER (S)

**Karen Gray**

*Records Analyst*

(Records Retention Schedules and Imaging – State Agencies)

Archives and Records Management Branch

*And / or*

**Jerry Lucente-Kirkpatrick**

*Records Analyst*

(RM Training; Retention Schedules and Imaging – Local Agencies)

Archives and Records Management Branch

*And / or*

**Melanie Sturgeon**

*State Archivist*

Archives and Records Management

Library, Archives and Public Records

Arizona Secretary of State

## ADDITIONAL CONTRIBUTORS TO THIS TRAINING

**Steve Adams**

*Senior Records Analyst*

National Archives and Records Administration (NARA)

(From presentation to *NAGARA - Indianapolis*, given on July 11, 2013)

**Patricia C. Franks, PhD, CRM**

*Associate Professor*

*MARA Program Coordinator*

*SLIS Internship Coordinator*

School of Library & Information Science

San Jose State University

(From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

## ALL RECORDS MANAGEMENT IN ARIZONA IS GOVERNED BY ARIZONA REVISED STATUTES (ARS)

- In Arizona, **everything that we do** in Records Management is governed by Arizona Revised Statutes (ARS).
- The ARS that govern Records Management are:  
    **§ 41-151.14 – §41-151.19**  
    **and**  
    Portions of **§39-101 – §39-128**
- The purpose of this training today is to discuss the management of electronic records.

## WHAT IS A "RECORD"

### 41-151.18. Definition of records

In this article, unless the context otherwise requires:

- **"records"** means all books, papers, maps, photographs or other documentary materials,
- **Regardless of physical form or characteristics**, including prints or copies of such items produced or reproduced on film or electronic media pursuant to section 41-151.16,
- **Made or received by any governmental agency** in pursuance of law or in connection with the transaction of public business and preserved or appropriate for preservation by the agency or its legitimate successor
- **As evidence of the organization, functions, policies, decisions, procedures, operations or other activities of the government, or because of the informational and historical value of data contained in the record**, and includes records that are made confidential by statute.

## WHAT IS NOT A RECORD

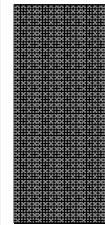
### 41-151.18. Definition of records - continued

**Not included within the definition of records as used in this article:**

- **Library or museum material** made or acquired solely for reference or exhibition purposes
- **Extra copies of documents preserved only for convenience of reference**
- **Stocks of publications or documents intended for sale or distribution to interested persons ("State Documents")**

## WHO IS USING SOCIAL MEDIA & WHY PUBLIC BODIES USE IT

SESSION 6 OF 7 ON RECORDS MANAGEMENT

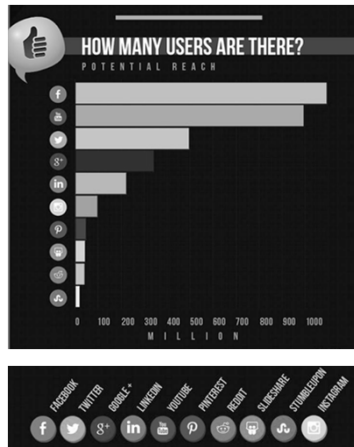


## SOCIAL MEDIA

- Facebook
- LinkedIn
- Twitter
- YouTube
- Google
- Skype
- GovLoop
- and many more

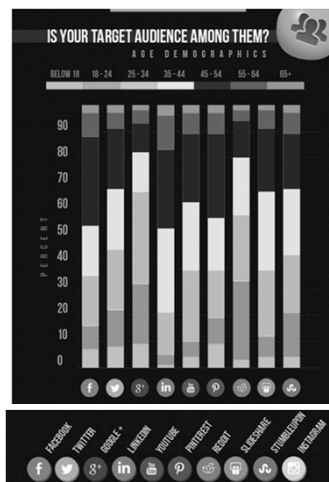


## WHERE DOES YOUR AUDIENCE “HANG OUT” – BASED ON NUMBERS?



<http://pinterest.com/pin/112097478197769776>

## Where does your audience “hang out” – based on age?



<http://pinterest.com/pin/112097478197769776/>

## PRIMARY USES OF SOCIAL MEDIA BY GOVERNMENT

### **Share**

Inform citizens of public services through social content (*result: increased access to information*)

### **Listen**

Observe, analyze and understand what citizens are sharing (*result: improved customer service*)

### **Engage**

Respond, collaborate and create with citizens to improve public services (*involve the community directly in government decision making*)

## BENEFITS OF SOCIAL MEDIA FOR PUBLIC BODIES

- Enable internal collaboration
- Information sharing with external partners or contractors
- Exchange information with the public
- Keep pace with fast moving events
- Harness the ideas of the public to support your mission

<http://howgovleads.com/2010/09/30/5-benefits-of-using-social-media-in-the-federal-government/>

- Enhance situational awareness

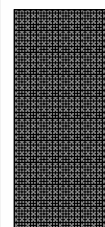
<http://www.govtech.com/e-government/Using-Social-Media-to-Enhance-Situational-Awareness.html>

## BENEFITS OF SOCIAL MEDIA FOR PUBLIC BODIES - CONTINUED

- Provide greater transparency
- Reach citizens where they are (online)
- Provide easier access to services and information for citizens
- Save time
  - word of mouth advertising
  - allowing citizens to answer questions for one another)
- Save money (otherwise spent on print materials and phone calls)

## WHAT RECORDS MANAGERS NEED TO KNOW ABOUT SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT





## OVERVIEW OF WHAT YOU NEED TO KNOW

- **Become familiar** with Social Media
- Understand the **value to the organization** and subunits
- Become involved from the start (RIM reference should be in every social media policy)
- Set **strategic plan** to handle social media records
  - both static and dynamic,
  - including the people, objectives, strategies and technologies
- Be sure provisions are made **for transfer or in place preservation**
- Continue to audit results and evaluate processes
- **Update your plan** as necessary
- Scan the horizon for **the next new technology** that results in records that must also be captured and managed—It's sure to come

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## TO IMPLEMENT SOCIAL MEDIA RECORDKEEPING

- Understand the specific risks that apply to social media
  - Know what the organization is doing with social media
  - Develop a social media information strategy
  - Support social media use with a policy that supports recordkeeping
  - Be proactive
  - Keep abreast of emerging trends in social media systems and use
- Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## RECORDS MANAGEMENT'S ROLE IN SOCIAL MEDIA GOVERNANCE

- Records management must understand the value and use of social media to business goals.
- Records management should determine the value of content and associated risks, including legal and regulatory requirements.
- Records management should be responsible for drafting governance policies and procedures including classification structure, metadata models, file plans, retention schedules, disposition instructions, and more.
- Records management should help identify technology requirements to support retention requirements.

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

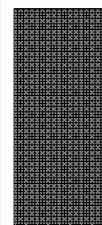
## IF ANSWER IS **YES** TO ANY OF THE FOLLOWING, YOUR SOCIAL MEDIA MUST BE SUPPORTED BY RECORDKEEPING FRAMEWORK

- Is a high risk or strategic business moving to (using) social media?
- Are business or client management decisions being made or communicated via social media?
- Are internal processes that were formerly supported by defined processes or workflows now moving to social media?
- Will clients rely on information posted to social channels?
- Will corporate reporting or accountabilities rely on the information posted to social media?
- Will any of the content being used on social media channels be reused?

• Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## LEGAL CHALLENGES OF SOCIAL MEDIA FOR PUBLIC BODIES

SESSION 6 OF 7 ON RECORDS MANAGEMENT



### RISK COMPONENT – TERMS OF USE (TOFU) CONTRACTS

#### **Problem – If you want to use the Social Media site you Agree!**

- Employee mindset toward setting up Social Media account is trained by their own personal use of Social Media
- We have been trained by previous use to “Click to Agree” to Terms and Conditions – but **this is a CONTRACT**
- **Contract between Public Body and Social Media site** very likely to be established by employee NOT Lawyer or Procurement professional
  - Employee likely did not even scroll through ToFU to review for acceptability
  - If they did, they probably would not know what is significant, what is in violation of Public Body procurement policies & practices, etc

## FACEBOOK – CALIFORNIA IS JURISDICTION

- If you (or your employees) click “Accept” – **Your Public Body** Agrees to:
  - You agree to handle any legal challenges in California
    - Santa Clare County
    - California State Laws apply
    - Agree to limit Indemnity
    - Are your Public Body Attorneys licensed in Calif?
- What You Lose – Your right to **handle dispute in Arizona**

## WORKING TOGETHER TO CHANGE FACEBOOK

**Attorneys General** from Colorado, Massachusetts, Michigan, New York, Pennsylvania, Washington state and several others, as well as the **National Association of Attorneys General** and **National Association of State CIOs (NASCIO)**'s Social Media Legal Workgroup participated in the yearlong discussions with Facebook.

When states began discussing concerns about social media 18 months ago, there was broad concern among state-level lawyers who worked in **procurement, CIO office and other business lines**, Robb said.

NASCIO Executive Director Doug Robinson added via a statement that terms-of-service problems “have impeded broader use” of Facebook and other social media tools by states.

**Colorado** took perhaps the most visible stance against Facebook. The **State Attorney General discouraged agencies from launching their own pages** because the terms of service were believed to violate the state constitution.

From *Public CIO*, January 05, 2011, by Matt Williams

### **SUCCESSSES FROM STATE & MUNICIPAL PARTNERSHIP - NEW FACEBOOK TOFU FOR PUBLIC BODIES**

New Option for 2011

State and Local Government Exception – What You Get

- Strikes Jurisdiction / venue in CA
- Strikes Application of CA Law
- Strikes the indemnity clause except to the extent indemnity is allowed by a state's constitution or law
- Encourage amicable resolution between public entities and Facebook over any disputes

### **FACEBOOK GOVERNMENT EXCEPTION – HOW TO GET IT**

- State and Local Government Exception Applies  
**ONLY IF:**
  - Select “Community / **Government**” Designation
  - **MUST** Link Facebook page to your Government website
  - Do NOT click “Education” or “Organization”
  - If you opened Facebook page before 2011 – **MUST** change page to “Community / Government”

## ADDITIONAL LEGAL CHALLENGES OF SOCIAL MEDIA

- Harassment
- Defamation
- Copyright/Trademark infringements
- Breach of Confidentiality
- Endorsement Advertising Violations
- Recordkeeping

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## SOCIAL MEDIA COURT CASES (ONLINE PERSONNA)

### **Eagle v. Morgan, 2013-11-4303 (E.D. Pa. 2013)**

One of the first trials on the issue of **who owns social media accounts**:

The individual **Employee** who first **created** the account?

Or the **Employer** whose business was promoted using the account?

The U.S. District Court for the Eastern District of Pennsylvania held that **an employer's conduct, absent a company social media policy**, resulted in the torts of unauthorized use of name, invasion of privacy by misappropriation and misappropriation of publicity.

<http://www.socialmedialawupdate.com/2013/03/articles/social-media/who-owns-your-online-persona/>

## "ONLINE PERSONNA" COURT CASES (CONTINUED)

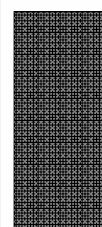
The employer may have prevailed *if it had implemented a social media policy* that covered factors relevant to ownership, such as whether:

- (1) the employer paid the social media account fees;
- (2) the employer dictated the precise contents of the employee's account;
- (3) the employee acted expressly on behalf of the employer due to her position, role or responsibility; or
- (4) the social media account was developed and built through investment of the employer's time and resources.

<http://www.socialmedialawupdate.com/2013/03/articles/social-media/who-owns-your-online-persona/>

## CHALLENGES OF SOCIAL MEDIA – RECORDS MANAGEMENT

SESSION 6 OF 7 ON RECORDS MANAGEMENT



## THE "PLACE" OF PUBLIC RECORDS

Why Mix Social Media and  
Records Management?

Isn't Inherent Transparency of Social Media  
Enough?

Are Openness and Transparency the only  
responsibilities of Government?

## DUTIES OF ALL PUBLIC BODIES AND EMPLOYEES FOR RETENTION & PRESERVATION

Establish and maintain an active,  
continuing program for the economical  
and efficient management of the public  
records of the agency.

*ARS 41-151.14(A)(1)*



## IS I.T. IN THE RM BUSINESS?

**Questions to think about as we move through the rest of this presentation:**

- What is the difference between data and records?
- Is it I.T.'s "responsibility" to provide Records Management service to their customers?
- Who is in the best position to "manage" electronic records? Is it I.T.?
- Is I.T. the creator of the content / record?
- Or, is I.T. the "post-er" of the content / record?
- Do any of these questions matter?

## WHEN IS SOCIAL MEDIA NOT SO SOCIAL?

Challenges with Social Media Records:

- A.R.S. require we (government) control (manage) our records during their entire retention period.
- Social Media sites provide little to no tools to help manage YOUR records on THEIR sites.
- Who controls the content on Social Media sites?

---

= Challenges to compliance with RM Statutes.

## I'VE GOT THE KEYS TO THE CAR, BUT NO BRAKES!

In Summary,

- “Everyone Is Doing It!” (Social Media)
- “No One Can Do It!” (RM for Social Media)
- You May or May Not Own It (Your Information)
- You Must Manage It (Your information)
- Where’s Facebook when you need help? (to meet Statutory requirements)
- “Why did you want to live here?”

## SOCIAL MEDIA VIRGINS BEWARE!

### 1. If You Post it, You Own It

- Whatever content / records government bodies post to Social Media sites **belongs** to the public body and **NOT** to the Social Media site - from a Records Management point-of-view.

### 2. If You Own It, You Manage It

- If you post something to any Social Media site, and the posting (words, pics, video, etc.) is work-related, then you have a statutory responsibility to retain the posted information for the approved & correct retention period.
- Link to *Social Media Records Retention Schedule*:
- <http://www.azlibrary.gov/records/documents/pdf/all%20-%20email.pdf>

### 3. If You Created It, You Own It

- The **Creator of any content** being posted to social media sites (or other websites) needs to be **responsible for the proper retention** of the content they created.

## YOU'VE GOT THE POWER - AT LEAST SOME



### 4. Unique vs. Copy

- **Copies Are Not Records.** As such, copies do not need to be managed.
- **Avoid posting any unique or original content** to social media sites. Post only copies of information being managed elsewhere by a specific person responsible for its retention. This is especially grievous with **Videos** posted to YouTube, and the like.

### 5. “Blogs and Wall Posts, Oh My!”

- These are the two most likely areas for Unique content that will need to be managed.

### 6. Email All Wall Posts

- Make sure you set up your social media site to generate an email to your designated email account (ex. [records@azlibrary.gov](mailto:records@azlibrary.gov)) **whenever anyone posts a comment to your wall**. You can then manage that email for retention since you cannot manage the retention on your social media site.

### 7. Email All Posted Content

- When you **post information to your social media website**, copy the designated email account (ex. [records@azlibrary.gov](mailto:records@azlibrary.gov)) on that email. This gives you some way of tracking what was on your Social Media site at what time.

## RM QUESTIONS FOR SOCIAL MEDIA MANAGEMENT

Important RM Concept for all forms of Electronic Communication:

- Is **Content** in Communication a **Copy**?
- Is that content (of original not copy) **being retained and managed** (from RM perspective) elsewhere?
- Is **Content Unique** information?
- Is Unique Content **being retained and managed** (from RM perspective)?

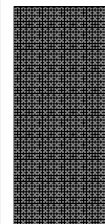
## KEY ASPECTS TO YOUR SOCIAL MEDIA POLICY

- **Identifying what constitutes a record** on social media platforms
- Defining ownership of content and **responsibility for managing** the records
- Developing recordkeeping requirements
- Incorporating recordkeeping practices and requirements into Terms of Use
- **Communicating records policies so employees** and the public understand how records will be managed
- Monitoring the **ongoing use of social media platforms** to determine if that use changes the value of the records
- Monitoring any changes to third-party terms of use

Steve Adams (From presentation to NAGARA - Indianapolis, given on July 11, 2013)

## FOUR (4) SPECIFIC PROBLEM AREAS

SESSION 6 OF 7 ON RECORDS MANAGEMENT



## 1. BEWARE “EXECUTIVE COMMUNICATION” AND SOCIAL MEDIA

### \*\*\*Beware “Executive Correspondence” in Social Media\*\*\*

- Executive Correspondence is a **Permanent** record if it “sets or discusses policy”.
- Permanent Records - **must** be retained on paper or microfilm.  
\*\*\*How will this be possible on Social Media?
- **Any communication / correspondence** that either discusses or sets policy, and takes place in any “physical form or characteristic” (ARS §41-1350), involving an executive (any Board, Commission or Council member, an Agency Director, elected official, County / Department / Division Leadership) will meet the definition of “Executive Correspondence”.
- **Where** this discussion takes place does not matter: could be on paper, on a website, in an email, on Social Media, in a blog, in a shared workspace, definitely in Sire, etc.
- Since Policies are Permanent, then executive discussions of Policies become important Permanent records to help provide context to the Policy(ies).
- This specific records series is from the *Management Records* General Retention Schedules

## 2. DEFINITION OF HISTORICAL RECORD - OF INTEREST TO STATE ARCHIVES

If a record is historically significant, it is a permanent record.

\*\*Permanent Records are of interest to the State Archives and future researchers.

The following are deemed **historically significant** records when:

- Document a **controversial issue**
- Document a program, project, event or issue that **results in a significant change that affects** the local community, city, county or state
- Document a program, project, event or issue that **involves prominent people, places or events**
- Document a program, project, event or issue that **resulted in media attention** locally, statewide or nationally

### General Retention Schedules

Any record series listed as permanent on a general retention schedule should be transferred to the State Archives when the agency or political subdivision no longer wishes to maintain those records. You can reach the State Archives at 602-926-3720 or 800-228-4710 to discuss the transfer of the records.

### 3. VIDEO AS RECORD / PERMANENT RECORD

Videos and Tweets: Your website, YouTube, FaceBook, Twitter, etc

- Make sure your only copy of the video / tweet is NOT online @ Social Media site.

What types of videos / tweets would be of interest:

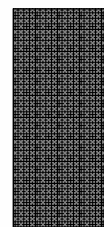
- Involving Core Values / Duties of Office
- Deal with controversial topics and/or topics of interest – You will recognize many of these issues, especially if you suddenly get a large number of letters, calls or e-mails on a hot topic:  
     in **opposition** to an issue  
     in **support** of an issue  
     **expressing a concern**
- **Examples of Current / Recent Issues**  
     Abortion, Alternative fuels, Environmental issues, Fiscal concerns, Forests, wildfires and forest management, Gambling / casinos, Gas prices, Gay rights, Gun control, Freeways or highways, Illegal immigration, Land and development issues, Legalization of drugs, Legislation (involving your Agency), Important landmarks (if you still have correspondence), Terrorism/terrorists, Water issues, Welfare issues (for or against)

### 4. ELECTED OFFICIALS AND SOCIAL MEDIA

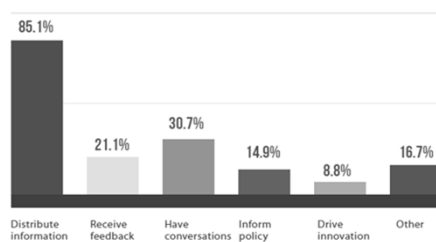
- Avoid “cleaning house” to make room for the newly elected official.
- Include both in-house and vendor / media produced
- Controversial Topics / Topics of Interest (prev. 2 slides)
- What records on Social Media will be of interest to the State Archives and the future:
  - Videos / Tweets / Media attention specifically involving the elected official
  - Inauguration
  - Speeches / Statements
  - Letters / Proclamations
  - Press Releases
  - Significant Events
  - Photos
  - Bio Statements
  - Involving Core Values / Duties of Office

## SOCIAL MEDIA, PUBLIC BODIES & RECORDS MANAGEMENT

SESSION 6 OF 7 ON RECORDS MANAGEMENT

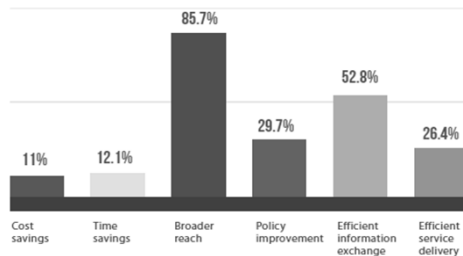


### PRIMARY OBJECTIVE IN USING SOCIAL MEDIA



Results of GovLoop survey with 100 respondents from federal, state, city, and county governments. Source: GovLoop  
"The Social Media Experiment in Social Media: Elements of Excellence."

## DEMONSTRABLE MISSION IMPACT



Results of GovLoop survey with 100 respondents from federal, state, city, and county governments. Source: GovLoop "The Social Media Experiment in Social Media: Elements of Excellence."

## WHAT GOVERNMENT DIVISIONS ARE USING SoMe?

### WHAT FUNCTIONAL AREA IN YOUR ORGANIZATION USES SOCIAL MEDIA?

FUNCTION	%
Communications / Public Affairs	80.7%
Emergency Management / Fire / Police	34.9%
Parks and Recreation	25.7%
Community Planning	22.9%
Public Works	22.9%
Health and/or Human Services	21.1%
Economic Development	19.3%
Environmental Protection / Services	19.3%
Transportation	17.4%
Budgeting / Finance	11.0%
Acquisition / Contracting	8.3%
Property Management	3.7%
Other	16.5%

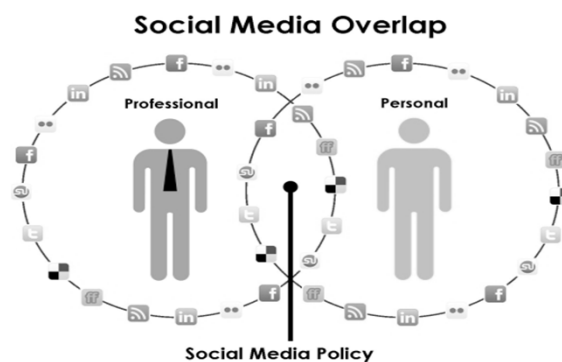
Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)



## SOCIAL MEDIA RISKS

- Reputational damage
- Data leaks
- Privacy breaches
- Cyber-security
- Clueless or rogue employees

## SOCIAL MEDIA OVERLAP



© Mark Smicklas, New Marketing & Social Media Strategist, IntersectionConsulting.com

## DEVELOP A SOCIAL MEDIA INFORMATION GOVERNANCE FRAMEWORK

- Map the business (or unit) that is moving to (or using) social media
- Map the information that is moving to social media
- Assess your information needs and expectations, as well as public accountabilities that are dependent on your business information

<http://futureproof.records.nsw.gov.au/why-you-need-social-media-information-governance-frameworks/#more-2860>

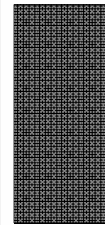
## DEVELOP A DEFENSIBLE RIM PROGRAM

- Create and implement a records and information management (RIM) program.
- Consider legal retention requirements 'before' implementing social media initiatives.
- Publically state you will be capturing and keeping social media information you need to support your operations.
- Periodically delete ESI according to your "formal" retention policy.
- Enforce, evaluate, and update your Social Media and Records & Information Management policies and practices.

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## TOOLS FOR MANAGING SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT



## CAPTURING BLOGS

- If the blog does not contain comments, **the blog posts can be captured and saved to a content management system** before they are uploaded to the site.
- If the blog does contain comments, **an RSS feed can be used to capture comments and forward them to the organization.**
  - Some organizations use a sampling technique to capture some but not all of the comments made by visitors to the blog.
- If the entire blog, not individual posts, risks to the level of a record, **the entire blog site can be captured in the same way a website is captured.**
  - See RM Session 5 on Electronic Records

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## CAPTURING MICROBLOGS (TWEETS)

- One of the easiest ways for an individual to archive microblogs is by **grabbing the RSS feed for the tweet stream of choice and then adding it to a preferred RSS reader**. If you use Google Reader, you'll need an alternative, such as Feedly (<http://feedly.com/>).
- **Enterprise Microblogs** allow users to communicate, collaborate, and share files with others on the enterprise network. Two examples: Yammer and Chatter.
- Organizations can engage a social media archiving service, such as RegEd's Social Media Archiving and Surveillance Solution for the financial services industry (<https://www.arkovi.com/>). This software as a service (SaaS) solution archives social content in the cloud; allows search, filter, and export to Excel or XML; and even exports directly to a third-party backup or archiving service.

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## CAPTURING CONTENT FROM SOCIAL NETWORKING SITES

### Facebook

- allows users to download a copy of their Facebook data from the General Account Settings screen.
- By selecting *Download a copy of your Facebook data*, the user can instruct Facebook to create an archive of photos, wall posts, messages, and other information.
- An expanded archive can also be downloaded that includes historic information such as the mobile phone numbers added to the account, a list of log-ins stored for the account (not complete), and the IP addresses from which the user logged out.

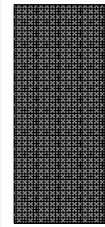
### LinkedIn

- doesn't provide tools that make it easy to download all content from an account.
- But an individual or organization that has invested time in developing their contact list could protect that information by exporting a file containing those contact names through the Export connections link on the Contacts page on a regular basis.
- The data can be exported as a .CVS file that can be downloaded and then imported into Microsoft Outlook, Outlook Express, or Yahoo! Address Book or a .VCF file for import into the Mac OS Address Book.

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

## QUICK RM TIPS FOR SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT



### THINK BEFORE YOU TWEET...

([HTTP://WWW.LIB.AZ.US/RECORDS/DOCUMENTS/PDF/SOCIAL\\_NETWORKING.PDF](http://www.lib.az.us/records/documents/pdf/social_networking.pdf))

- **Use of Terms**
  - Incorporate the Terms of Use into your policy / procedures
- **Keep It Simple**
  - Keep to one topic at a time – for ease of Records Mgmt
- **Use a Title / Heading**
  - Where possible (blogs) use a Heading to help with Records Mgmt
- **Train, Train, Train**
  - You can never train staff too much on e-communications & RM
- **The Matrix**
  - Keep a Matrix of who is using Web 2.0, by application
- **If it Works, Use It**
  - Consider having a SocNet site that tells others how to set these up

## GOT QUESTIONS?



# Any Questions?

## HELPFUL CONTACTS

**Records Management Center (LAPR):**  
<http://www.azlibrary.gov/records/>  
 Phone: 602-926-3815  
[records@azlibrary.gov](mailto:records@azlibrary.gov)

**Karen Gray**  
[kgray@azlibrary.gov](mailto:kgray@azlibrary.gov)  
 Phone: 602-926-3817

**Jerry Lucente-Kirkpatrick:**  
[jkirkpatrick@azlibrary.gov](mailto:jkirkpatrick@azlibrary.gov)  
 Phone: 602-926-3820

**Dr. Melanie Sturgeon:**  
[msturgeon@azlibrary.gov](mailto:msturgeon@azlibrary.gov)  
 Phone: 602-926-3720  
 Toll Free: 1-800-228-4710 (Arizona only)

**State Ombudsman's Office**  
<http://www.azleg.gov/ombudsman/default.asp>

**State Attorney General – Public Records Publication**  
<https://www.azag.gov/sites/default/files/sites/all/docs/agency-handbook/ch06.pdf>

**AIIM – Global Community of Information Professionals**  
<http://www.aiim.org/>

**ARMA International:**  
<http://www.arma.org/>

**Institute of Certified Records Managers (ICRM):**  
<http://www.icrm.org/>

**National Archives and Records Management (NARA):**  
<http://www.archives.gov/records-mgmt/>

**National Association of Government Archivists and Records Administrators (NAGARA):**  
<http://www.nagara.org/index.cfm>